

**Appendix Table F-18****Sources for advertising HHI tables**

<b>Broadcast television</b>	Ownership and net revenue figures are from BIA Publications, INVESTING IN TELEVISION 1994 and 1995, 1st Editions. Gross revenue is computed assuming that net revenue is 84.4% of gross revenue. Television station ownership was updated based on trade press. Local revenues are derived by multiplying the total revenue by the ratio of local broadcast television advertising expenditures to total broadcast television advertising expenditure, reported by McCann-Erickson.
<b>Cable television</b>	Local gross revenues for Cleveland, Youngstown, and New York are based on Paul Kagan Associates, CABLE TV ADVERTISING, May 18, 1993, Nov. 29, 1993, Dec. 31, 1994, and Jan. 25, 1995. Total local gross revenues for 1994 for each of the other DMAs are from James H. Duncan, DUNCAN'S RADIO MARKET GUIDE, 1995 Edition, 1994. 1993 data were obtained by multiplying the 1994 total for the market by the ratio of local cable advertising nationwide in 1993 to local cable advertising nationwide in 1994, reported by Paul Kagan Associates, KAGAN MEDIA INDEX, Feb. 25, 1995, at 14. Gross revenue data for were allocated among MSOs with at least 10,000 DMA subscribers based on the number of subscribers, using the A.C. Nielsen cable system database (March 1995). In Portland, two MSOs with more than 10,000 DMA subscribers were members of an interconnect whose advertising revenue was reported by Kagan. The interconnect revenue was subtracted from Duncan's estimate, and the remainder allocated between the non-interconnected MSOs based on the number of subscribers. Local cable advertising revenue is obtained by multiplying total cable advertising revenue by 1 minus the ratio of national cable advertising revenue to total cable ad revenue. National cable advertising revenue from Linda Moss, Multichannel News,..., Total cable ad revenue reported by McCann-Erickson, 1994.
<b>Radio</b>	Gross revenue is from DUNCAN'S RADIO MARKET GUIDE, 1994 and 1995 Editions. Station ownership is from DUNCAN'S RADIO MARKET GUIDE, 1995; BROADCASTING & CABLE YEARBOOK 1994; BROADCASTING & CABLE, Feb. 27, 1995, at 34-46, 57, 58; Mar. 6, 1995, at 55-57; Mar. 13, 1995, at 61-63; and Mar. 20, 1995, at 46-49. Local radio advertising revenue is obtained by multiplying total radio ad revenue by the ratio of local to total radio ad revenue, reported by McCann-Erickson, 1994.

**Appendix Table F-18****Sources for advertising HHI tables**

<b>Newspaper</b>	Gross revenue is from DUNCAN'S RADIO MARKET GUIDE., 1994 and 1995 Editions, and excludes classified advertising. All revenue is attributed to the major daily newspapers listed by Duncan. In markets with more than one daily paper, revenue was allocated on the basis of each paper's share of total circulation in the market. Newspaper ownership and circulation are from DUNCAN'S RADIO MARKET GUIDE, 1995 Edition and EDITOR & PUBLISHER INTERNATIONAL YEARBOOK, 1994. Local newspaper ad revenue is obtained by multiplying total ad revenue by the ratio of retail to total. Ratio is calculated from Newspaper Association of America, Facts About Newspapers, at 10, 11.
<b>Outdoor</b>	Gross revenue data from DUNCAN'S RADIO MARKET GUIDE, 1994 and 1995 Editions, in the relevant local markets were divided evenly between companies covered by Competitive Media Reporting. Local outdoor advertising revenue is obtained by multiplying total outdoor revenue by the ratio of local to total, as reported by McCann Erickson, 1994.
<b>Yellow pages, direct mail, and miscellaneous local advertising</b>	McCann-Erickson U.S. expenditure data for national and local yellow pages and direct mail, as reported by Television Advertising Bureau, TRENDS IN ADVERTISING VOLUME, May 1994, and McCann-Erickson Worldwide, INSIDER'S REPORT: ROBERT COEN PRESENTATION ON ADVERTISING EXPENDITURES, Dec. 1994, at 3, were allocated to DMAs based on the ratio of (a) gross advertising revenue for television and cable systems in the DMA to (b) gross advertising revenue for television stations and cable systems in the U.S. from Paul Kagan Associates, KAGAN MEDIA INDEX, Feb. 28, 1995, at 14. Each DMA's share of yellow pages advertising is divided based on circulation between publishers of directories with DMA distribution of at least 100,000, from Yellow Pages Publishers Association, NATIONAL YELLOW PAGES ADVERTISING RATES AND DATA, Jan. 1995. Miscellaneous local advertising is computed as 6% of the total of all other media, as McCann-Erickson computes the nationwide estimate. It is assumed that direct mail and miscellaneous local advertising are supplied by numerous independent companies. Hence, the squares of the shares of these media are not included in the HHI computations. Local revenue was obtained in all three media by multiplying total by the ratio of local to total. For yellow pages the ratio is calculated from McCann-Erickson. 50% of direct mail expenditures are assumed to be local, and 100% of miscellaneous local advertising is assumed to be local.



**APPENDIX G**

**CONCENTRATION OF NATIONAL VIDEO  
PROGRAMMING PURCHASES**

**ECONOMISTS INCORPORATED**

## Appendix G      Concentration of national video programming purchases

The purpose of this appendix is to estimate the concentration of purchases of national video program rights in the United States. This appendix also explains how the data were prepared, including sources, assumptions and methods of estimation.

The starting point is data on the 1994 revenues of U.S. distributors of television programs and television rights to theatrical films, broken down by category of media outlet. Only entertainment programming has been considered; news, sports and other non-entertainment programming are excluded. Appendix Table G-1 presents a breakdown of these expenditures.

**Appendix Table G-1      Expenditures on video programming**

	Expenditures (\$ millions)	Share of total expenditures (percentage)
Total ABC, CBS and NBC	3,447	23.0
Fox	689	4.6
Syndication	3,695	24.6
Basic cable	1,618	10.8
Pay cable	1,255	8.4
Home video	4,300	28.7
<b>Total</b>	<b>15,004</b>	<b>100.0</b>

Source: See text.

ABC, CBS and NBC each provided data on their 1994 program expenditures for relevant television programs and for broadcast rights to theatrical films. Aggregated across these three networks, such expenditures totaled \$3,447 million. This figure includes \$696 million, aggregated across the three networks, associated with programming produced internally. Expenditures of Fox Broadcasting Company on television programs and

films were estimated at \$689 million in 1993.<sup>251</sup> Fox's total expenditures were assumed to have remained at this same level for 1994.

The 1994 expenditures of basic cable networks on relevant television programs were estimated at \$1,618 million. This is based on an estimate by Paul Kagan Associates, Inc. (*Cable TV Programming*, May 23, 1994) that 29 basic cable networks spent \$2,417 million on programming in 1994. It was assumed that news programming accounted for \$297 million of this, based on Kagan's estimate for combined expenditures of CNN, Headline News, CNBC and The Weather Channel. Further, it was assumed that sports programming accounted for \$502 million based on Kagan's estimate for expenditures by ESPN and Prime Sports Channel America. Programming expenditures of \$0.3 million by the Prevue and Sneak Prevue channels also are excluded.

All remaining data in Appendix Table G-1 are based on estimates obtained from Wilkofsky Gruen Associates. The syndication expenditure figure includes barter syndication.

Appendix Table G-2 reports expenditures on programming after subtracting estimated expenses associated with distribution. In the case of expenditures by broadcast networks, basic cable networks and pay cable networks, it is assumed that none went to distribution fees. Distribution fees were assumed to absorb 40 percent of U.S. distributor revenues in the case of domestic syndication (excluding barter syndication) and 45 percent in the case of home video. The 45 percent figure is based on an estimate by Paul Kagan Associates, Inc. that the studios receive about 55 percent of the gross revenues from factory sales of pre-recorded video cassettes.

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<sup>251</sup> Paul Kagan Associates, Inc., TV PROGRAM INVESTOR, Oct. 31, 1994.

Appendix Table G-2

Expenditures on video programming  
net of distribution fees

	Expenditures (\$ millions)	Share of total expenditures (percentage)
Total ABC, CBS and NBC	3,447	28.1
Fox	689	5.6
Syndication	2,897	23.6
Basic cable	1,618	13.2
Pay cable	1,255	10.2
Home video	2,365	19.3
<b>Total</b>	<b>12,271</b>	<b>100.0</b>

Source: See text.

To estimate the concentration of purchases of video programming, total net expenditures in Appendix Table G-2 were allocated among individual commonly-owned purchasing groups, to the extent possible. ABC, CBS and NBC were assumed each to have made one third of their combined network broadcasting programming expenditures. Estimated programming expenditures for 22 basic cable networks were allocated among the owners of these networks according to their ownership interests. See Appendix Table G-3. Estimated programming expenditures by pay cable networks were divided among 12 networks according to each network's subscriber count, and these expenditures were then allocated among the owners of these networks according to their ownership interests. See Appendix Table G-4. Estimated expenditures by syndicators were allocated using the viewership of 31 syndicators, measured in gross households per week during November 1994, and these syndicators were grouped by owner. Syndicators with fewer than 1 million gross households per week were aggregated together as "other." See Appendix Table G-5.

Approximately 92 percent of estimated expenditures by video cassette distributors could be attributed to the ten largest owners of video cassette distributors, based on their 1993 revenues. (Warren Publishing, Inc., *Buena Vista Leads Overall Market Share List*, VIDEO WEEK, Feb. 28, 1994.)

See Appendix Table G-6. It was assumed that the remaining video cassette expenditures were made by a single unknown "other" firm with no other video expenditures except the "other" expenditures made by relatively small syndicators.

Using the information in Appendix Tables G-3 through G-6, total estimated video purchases were calculated for 55 separate commonly-owned purchasing groups in Appendix Table G-7. The HHI for these purchasers was 738.

Appendix Table G-3

## U.S. basic cable network program expenditures, 1994

Owner	Network	Ownership share (%)	Network program expenditures (\$millions)	Total program expenditures (\$millions)
A&E Network	A&E Network	100.0	58.5	58.5
Cablevision Systems	American Movie Classics	75.0	38.0	38.0
Comedy Central	Comedy Central	100.0	33.0	33.0
Courtroom Television Network	Courtroom Television Network	100.0	16.0	16.0
Discovery Communications	The Discovery Channel	100.0	115.0	138.0
	The Learning Channel	100.0	23.0	
E! Entertainment Television	E! Entertainment Television	100.0	23.0	23.0
Gaylord Entertainment	Country Music Television	67.0	6.5	81.5
	The Nashville Network	100.0	75.0	
MTM/Inter. Family Enter.	The Family Channel	100.0	73.0	73.0
Landmark Communications	The Travel Channel	100.0	10.0	10.0
Lifetime Television	Lifetime Television	100.0	101.3	101.3
Nostalgia Network	Nostalgia Television	100.0	4.8	4.8
Robert Johnson	Black Entertainment Television	55.2	25.9	25.9
Turner Broadcasting	TBS	100.0	143.0	509.0
	The Cartoon Network	100.0	6.0	
	Turner Network Television	100.0	360.0	
USA Network	USA Network	100.0	250.0	280.0
	Sci-Fi Channel	100.0	30.0	
Viacom	MTV	100.0	83.0	226.0
	Nickelodeon/Nick At Nite	100.0	110.0	
	Video Hits One	100.0	33.0	
Total			1618.0	

Note: 1994 revenue shares are based on 1995 ownership.

If entity A owns more than 50% of entity B, then entity B is combined into entity A. However, if no one entity has more than 50% ownership of entity B, then entity B is treated as a separate company. The USA Network and the Sci-Fi Channel have the same ownership percentages and are considered to be operated together.

Source: Paul Kagan Associates, Inc., *Cable TV Programming*, May 23, 1994, at 3, for revenue; *Cable TV Programming*, Aug. 29, 1994, at 2-3; trade press for ownership.

Appendix Table G-4

## U.S. pay cable program expenditures, 1994

Network	Owner	Ownership share	Subscribers	Expenditures (\$millions)
ANA Television Network/Arab-Net	ANA Television Network/Arab-Net	100	10,000	0
Canal Sur (Channel South)	Canal Sur (Channel South)	100	9,000	0
Cinemax	Time Warner	100	6,700,000	169
The Disney Channel	Disney	100	7,830,000	197
Encore	TCI	90	5,100,000	128
The Filipino Channel	ABS-CBN Broadcasting	100	5,000	0
Flix	Viacom	100	900,000	23
Home Box Office	Time Warner	100	18,000,000	453
The Movie Channel	Viacom	100	2,700,000	68
Showtime	Viacom	100	7,600,000	191
Starz!	TCI	98	1,000,000	25
TV Japan	Japan Network Group Inc.	100	25,000	1
Total			49,879,000	1,255

Note: If entity A owns more than 50% of entity B, then entity B is combined into entity A. However, if no one entity has more than 50% ownership of entity B, then entity B is treated as a separate company.

Source: Wilkofsky Gruen Associates for expenditure total (Table G-2); *Cablevision*, Feb. 6, 1995, at 60 for subscriber totals; and *Cable TV Programming*, Aug. 29, 1994, at 2-3; trade press for ownership.

Appendix  
Table G-5

U.S. syndication program expenditures, 1994

Syndicator	Owner	Gross households per week (000s)	Share (%)	1994 U.S. program expenditures (\$millions)
Viacom†	Viacom	290,483	21.2	615
King World	King World	280,094	20.5	593
Warner	Time Warner	134,381	9.8	285
Twentieth TV	News Corp./Fox	119,366	8.7	253
Buena Vista	Disney	99,818	7.3	211
Multimedia	Multimedia	77,437	5.7	164
Columbia	Sony	70,637	5.2	150
MCA	MCA/Matsushita	46,179	3.4	98
Genesis	New World/Ron Perelman	30,030	2.2	64
Turner	Turner Broadcasting	26,725	2.0	57
All American	All American	26,442	1.9	56
Tribune	Tribune	21,342	1.6	45
Rysher TPE	Cox Enterprises	18,320	1.3	39
Group W	Group W	16,054	1.2	34
Saban	Saban	15,015	1.1	32
MGM	Credit Lyonnais/MGM	14,165	1.0	30
Program Exchange	Saatchi & Saatchi	13,221	1.0	28
MTM/IFE	MTM/Int'l Family Enter.	13,221	1.0	28
Claster	Hasbro	10,105	0.7	21
Bonbot	Bohbot	6,988	0.5	15
Cannell	New World/Ron Perelman	5,194	0.4	11
Samuel Goldwyn	Samuel Goldwyn	4,250	0.3	9
DLT Enter.	DLT Enter.	3,778	0.3	8
ITC	ITC	3,116	0.2	7
Grove TV	Grove TV	1,983	0.1	4
ACI	ACI	1,889	0.1	4
Pro Sports Ent.	Pro Sports Ent.	1,605	0.1	3
Titan Sports	Titan Sports	1,417	0.1	3
Western Int'l	Western Int'l	1,322	0.1	3
Litton	Litton	1,039	0.1	2
Hearst	Hearst Corp.	1,039	0.1	2
Other	Other	11,049	0.8	23
Total		1,367,703	100	2,897

Note: Total annual gross advertising revenue is allocated among syndicators in proportion to gross number of households per week during November 1994. If entity A owns more than 50% of entity B, then entity B is combined into entity A. However, if no one entity has more than 50% ownership of entity B, then entity B is treated as a separate company. All entities with less than 1 million gross households in November 1994 are summed into "other."

† Includes Worldvision, a division of Blockbuster Entertainment.

Source: Analysis of Nielsen Cassandra Ranking Report for Equivalent National Rankings, 11/93 and 11/94 diary reports, in Paul Kagan Associates, TV PROGRAM STATS, Jan. 23, 1995, at 3 for households; and Wilkofsky Gruen Associates for expenditure total.

**Appendix Table G-6 Program expenditures for U.S. home video distributors, 1994**

<b>Distributor</b>	<b>Owner</b>	<b>Share (%)</b>	<b>Total 1994 U.S. program expenditures (\$millions)</b>
Buena Vista	Disney	23.8	563
Warner			
Warner	Time Warner	11.2	265
MGM/UA	Time Warner	2.8	66
HBO	Time Warner	2.1	50
Columbia/TriStar			
Columbia/TriStar	Sony	10.1	239
New Line	Sony	3.2	76
FoxVideo	News Corp./Fox	11.4	270
Paramount	Viacom	9.8	232
MCA/Universal	MCA/Matsushita	9.7	229
LIVE	LIVE	3.0	71
Video Treasures	Video Treasures	2.1	50
Vidmark	Vidmark	1.5	35
Uni Distribution	Uni Distribution	1.1	26
Other	Other	8.2	194
Total		100.0	2365

Source: Wilkofsky Gruen Associates for total; *Buena Vista Leads Overall Market Share List*, VIDEO WEEK, Feb. 28, 1994 for market shares.

**Appendix Table G-7 Estimated U.S. program expenditures, 1994**

<b>Owner</b>	<b>1994 (\$millions)</b>	<b>Share (%)</b>	<b>HHI</b>
Viacom	1355	11.0	121.9
Time Warner	1287	10.5	110.0
News Corp./Fox	1211	9.9	97.5
Capital Cities/ABC	1149	9.4	87.7
CBS	1149	9.4	87.7
General Electric/NBC	1149	9.4	87.7
Disney	971	7.9	62.7
King World	593	4.8	23.4
Turner Broadcasting	566	4.6	21.2
Sony	464	3.8	14.3
MCA/Matsushita	327	2.7	7.1
USA Network	280	2.3	5.2
Multimedia	164	1.3	1.8
TCI	153	1.2	1.6
Discovery Communications	138	1.1	1.3
Lifetime Television	101	0.8	0.7
Int'l Family Enter./MTM	101	0.8	0.7
Gaylord Entertainment	82	0.7	0.4
New World/Ron Perelman	75	0.6	0.4
LIVE	71	0.6	0.3
A&E Network	59	0.5	0.2
All American	56	0.5	0.2
Video Treasures	50	0.4	0.2
Tribune	45	0.4	0.1
Cox Enterprises	39	0.3	0.1
Cablevision Systems	38	0.3	0.1
Vidmark	35	0.3	0.1
Group W	34	0.3	0.1
Comedy Central	33	0.3	0.1
Saban	32	0.3	0.1
Credit Lyonnais/MGM	30	0.2	0.1
Saatchi & Saatchi	28	0.2	0.1
Uni Distribution	26	0.2	0.0
Robert Johnson	26	0.2	0.0
E! Entertainment Television	23	0.2	0.0
Hasbro	21	0.2	0.0
Courtroom Television Network	16	0.1	0.0
Bohbot	15	0.1	0.0

**Appendix Table G-7 Estimated U.S. program expenditures, 1994**

<b>Owner</b>	<b>1994 (\$millions)</b>	<b>Share (%)</b>	<b>HHI</b>
Landmark Communications	10	0.1	0.0
Samuel Goldwyn	9	0.1	0.0
DLT Enter.	8	0.1	0.0
ITC	7	0.1	0.0
Nostalgia Network	5	0.0	0.0
Grove TV	4	0.0	0.0
ACI	4	0.0	0.0
Pro Sports Ent.	3	0.0	0.0
Titan Sports	3	0.0	0.0
Western Int'l	3	0.0	0.0
Hearst Corp.	2	0.0	0.0
Litton	2	0.0	0.0
Japan Network Group Inc.	1	0.0	0.0
ANA Television Network/Arab-Net	0	0.0	0.0
Canal Sur (Channel South)	0	0.0	0.0
ABS-CBN Broadcasting	0	0.0	0.0
Other	217	1.8	3.1
Total	12,271	100	738

Source: Appendix Tables G-3 through G-6.

BEFORE THE  
FEDERAL COMMUNICATIONS COMMISSION

Washington, D.C. 20554

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FEDERAL COMMUNICATIONS COMMISSION  
OFFICE OF THE SECRETARY

In re:

Review of the Commission's  
Regulations Governing Television  
Broadcasting

}

MM Docket No. 91-221

AN  
ECONOMIC ANALYSIS  
OF THE  
BROADCAST TELEVISION  
NATIONAL OWNERSHIP,  
LOCAL OWNERSHIP, AND  
RADIO CROSS-OWNERSHIP RULES

Volume 2

May 17, 1995

***ECONOMISTS INCORPORATED***

WASHINGTON, D.C.



## APPENDIX H

Network Television Association, *The Nets Work!: A Network  
Television Planning Guide*, 1995

ECONOMISTS INCORPORATED

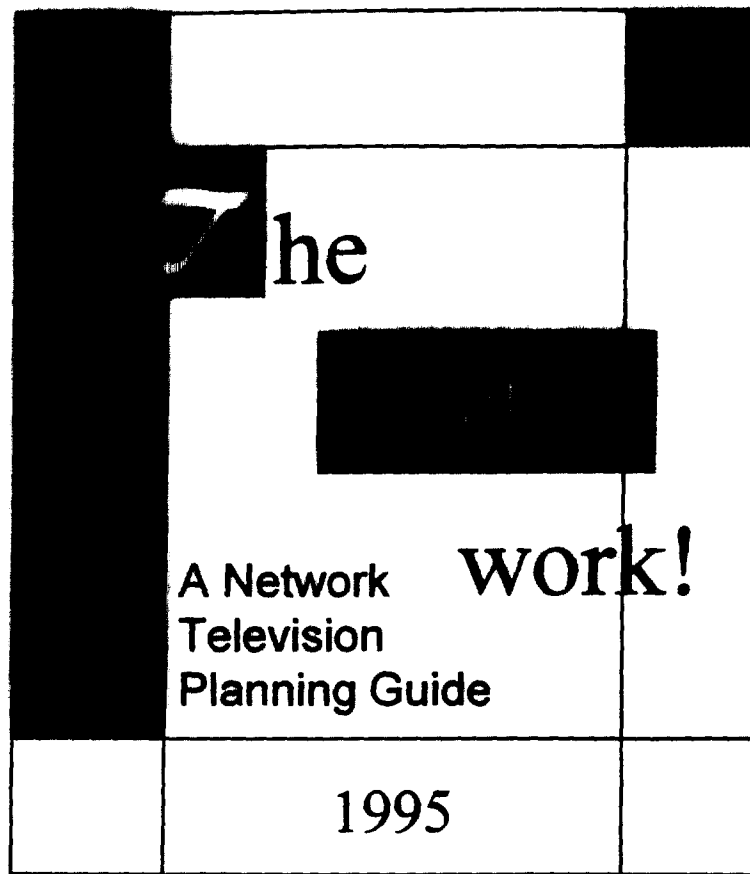
The

nets

work!

A Network  
Television  
Planning Guide

1995



**Coverage, Distribution, Reach, Targeting, Accountability, Entertainment and Information. Network Television is the most effective way to reach an advertiser's audience.**

**"The Nets Work" is a reference guide for answering frequently asked questions about the medium. It reviews today's media landscape and provides a primer on network television. We hope you find it informative and useful.**

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# Network Television: Perceptions

The nets work.

For more than fifty years, ABC, CBS, and NBC have set the standards. From "I Love Lucy" in the Fifties; to Home Improvement, ER, and 60 Minutes today; Network Television has been an integral element in popular culture. Television changed the face of advertising. Five decades later, there is still no other medium that gives an advertiser so much power to unify and shape each of our lives

***"Free, over-the-air television...is something that I think is part of our national community, and it helps to weave the fabric of our national culture together."***

Reed Hundt

FCC Chairman

Wall Street Journal.

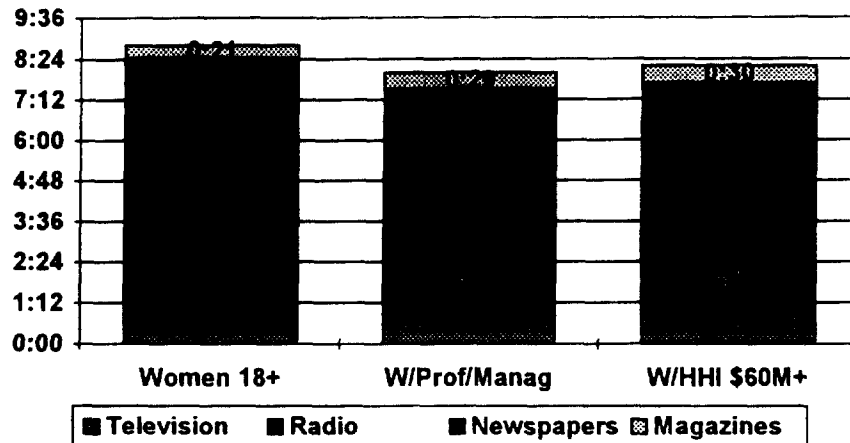
September 9, 1994.

As media options continue to expand, advertisers increasingly need to differentiate between choices. ABC, CBS and NBC remain the standards. Network Television is not only the favorite medium of consumers, it is also the most effective in presenting an advertiser's message and influencing the very people advertisers wish to target. When choosing which media option works best, the answer is: Network Television. The nets work!

## DAILY TIME SPENT WITH VARIOUS MEDIA

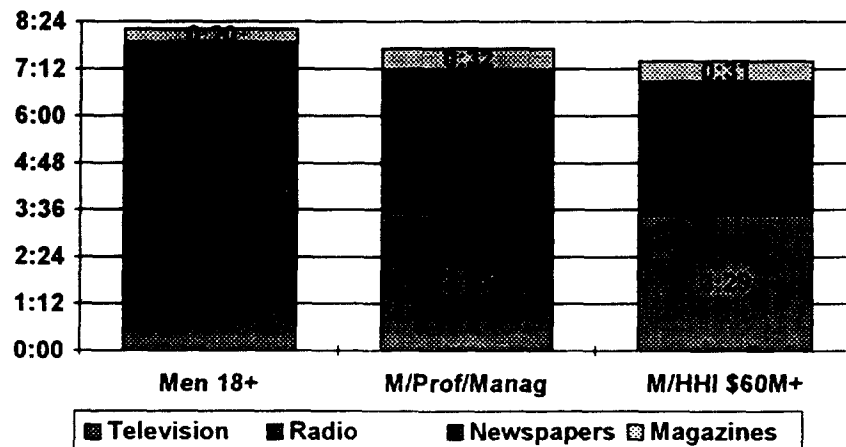
Television is the preferred medium of consumers today. The average male or female 18+ spends more time with television each day than all other media combined.

**Average Daily Time Spent in Hours  
Women**



Source: Compiled by Media Dynamics from Nielsen, SMRB, RADAR, Arbitron and other audience surveys. TV Dimensions '95.

**Average Daily Time Spent in Hours  
Men**

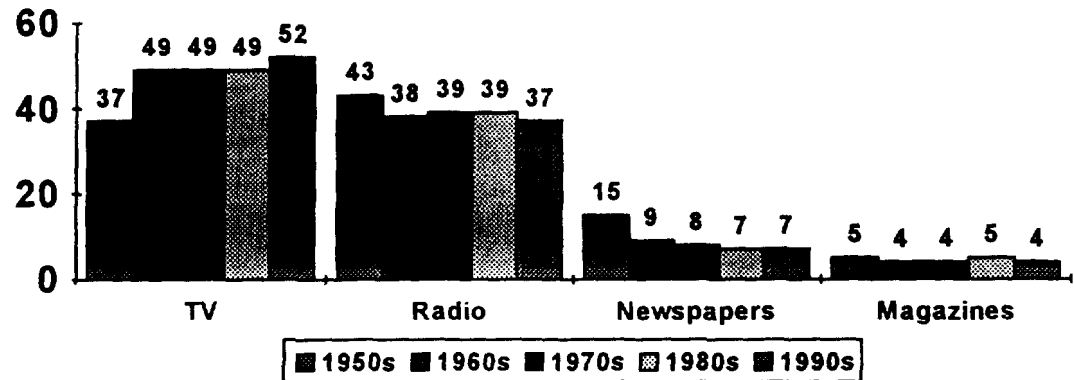


Source: Compiled by Media Dynamics from Nielsen, SMRB, RADAR, Arbitron and other audience surveys. TV Dimensions '95.

## SHARE OF VIEWING TRENDS

The share of time spent with television has increased over the last 40 years, while the share of time spent with other major media has declined.

Viewing Trends



Source: Compiled by Media Dynamics TV Dimensions 1995.

## WEEKLY CUME MEDIA REACH

More people can be reached in one week through television than any other medium.

Cume One Week Reach		
		% Adults
Television		90-96
Radio		90+
Newspapers		70-81
Magazines		80-86

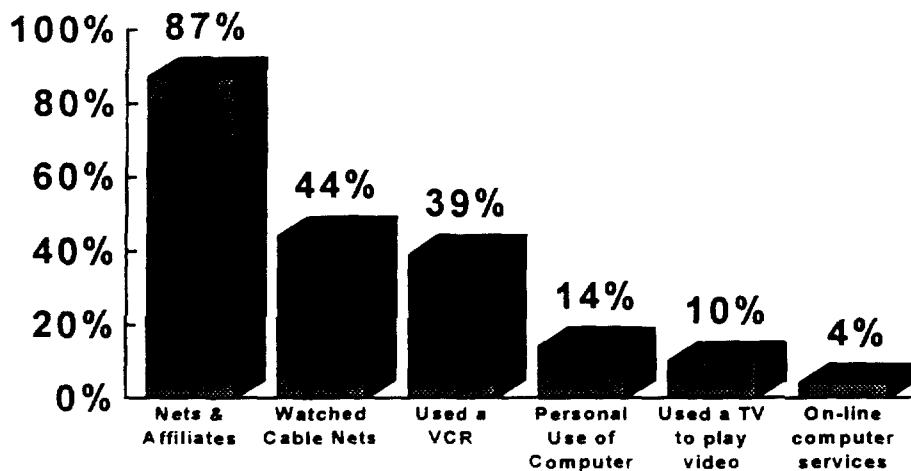
Source: Compiled by Media Dynamics TV Dimensions 1995.

## TELEVISION IN THE INFORMATION AGE

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Even with the advent of cable, VCRs and video games, network television continues to be a significant activity in virtually everyone's life.

### Past Week's Activities



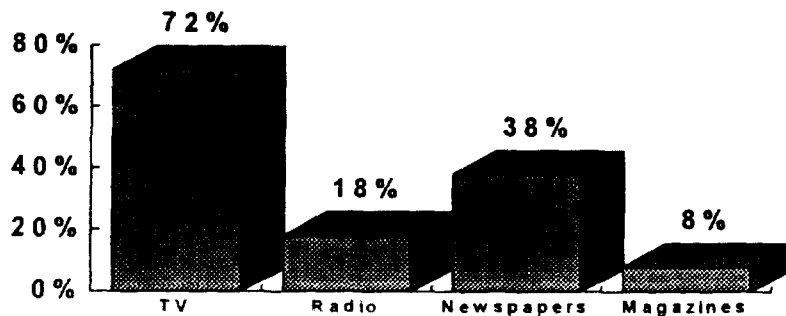
Source: 1995 Roper Study. Multiple responses permitted.

## PRIMARY MEDIA SOURCE FOR NEWS

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With the plethora of news sources available to the public today, television stands out as the primary source for news.

### American's Primary Media Source for News



Source: 1995 Roper Study. Multiple responses permitted.